

Survey carried out by
3Gem RESEARCH & INSIGHTS
on behalf of IPA Europe

The survey was conducted during the month of February 2022

- IPA Europe preliminary key findings
- Aggregate results (8 European Countries, 8.000 Consumers)

CONTEXT



IPA Europe is the European chapter of IPA, the International Probiotics Association; it was established in Brussels in 2015.



IPA Europe, with the partner organisation IPA, reach together **a platform of more than 100 member companies in 29 countries.**



The members of IPA Europe are **companies directly engaged in the manufacture of probiotic cultures or probiotic foods, supplements, nutritionals or therapeutic products: BioGaia, Chr. Hansen, Danone, IFF, IPA, Lallemand, Lesaffre, Probi, Yakult.**

The **IPA Europe mission** is:
to gain the acceptance of the term “probiotic” throughout Europe as a defined category, and to create a favourable environment for probiotics in Europe

To monitor changes in opinions, trends and behavior of European consumers regarding probiotic food and food supplements, the International Probiotics Association – Europe asked 3GEM to carry out a survey from a representative sample of 8.000 consumers in 8 European countries - to assess people’s understanding of the offer of probiotics currently on the market.

KEY FINDINGS - SUMMARY



Probiotic consumer profile



Probiotics are popular, even people who do not use or buy probiotics know the term



Consumers do not feel well informed that a product contains probiotics



Another term, such as live bacteria or live cultures, are more known than the term probiotics

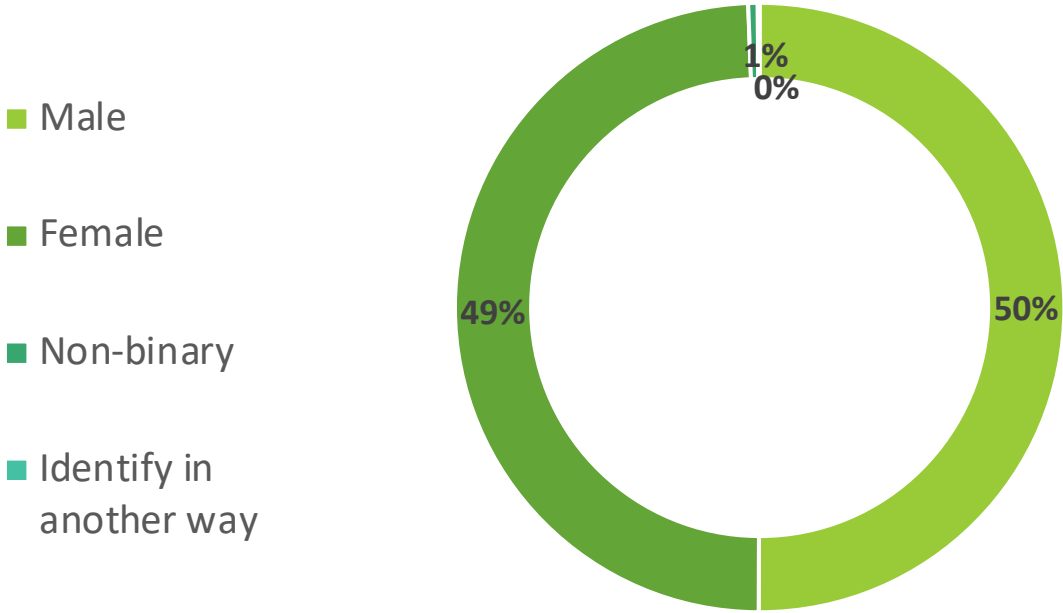


Consumers would like to be informed about probiotics through, for example, food labels



The usefulness and usage of probiotics are not well known by the consumers

Gender. Are you...?



Base: Base (8000)

Where do you live? 8 European Countries

Denmark, Sweden, The Netherlands, Spain, Belgium, Germany, Italy, Poland

8.000 Average Consumers from different areas and main cities

with a repartition of 1000 by Country

According to the ECJ's case-law, the average consumer will be considered as *'reasonably well-informed, reasonably observant and circumspect'*.

Question:

“Who are the probiotic consumers?”

Women and men appear to almost equally consume probiotics. In Italy and Denmark, we see a slightly bigger male population amongst probiotic consumers.

On average the consumption peak is in the 25-44 y/o group.

Highest usage shown in Poland (59%), Spain (44%) and Italy (41%).

In Denmark we see a high usage among 18-24 y/o, while there is less interest in the 45+ y/o

In Italy, Poland and Germany we see a relatively high usage in the 55+ group.

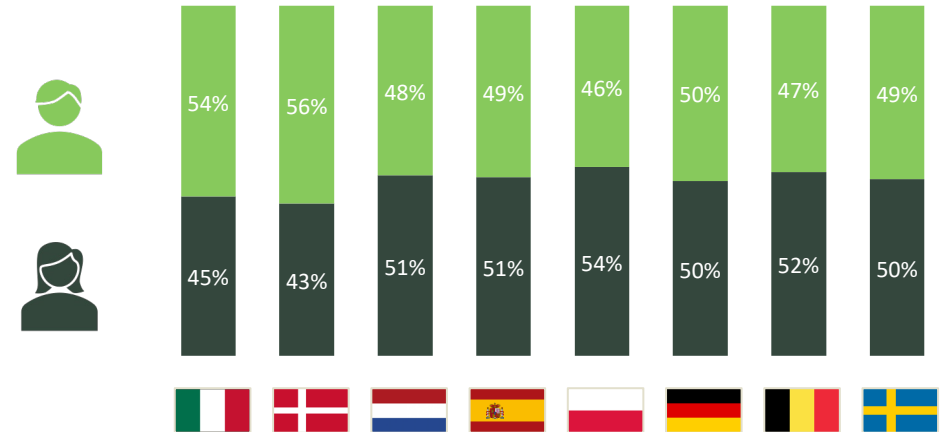


41% 19% 27% 44% 59% 38% 29% 27%



consumes

► Gender (n=2838)



► Age (n=2838)

	Italy	Denmark	Netherlands	Spain	Poland	Germany	Belgium	Sweden
18 - 24	9%	22%	14%	10%	7%	15%	15%	13%
25 - 34	17%	31%	32%	23%	24%	20%	26%	30%
35 - 44	23%	26%	23%	31%	27%	19%	19%	22%
45 - 54	27%	13%	14%	21%	17%	22%	21%	14%
55 - 64	17%	5%	11%	13%	19%	15%	13%	14%
65 +	9%	4%	6%	2%	6%	9%	7%	7%

KEY FINDINGS

- ▶ Probiotic consumer profile
- ▶ Probiotics are popular, even people who do not use or buy probiotics know the term
- ▶ Consumers do not feel well informed that a product contains probiotics
- ▶ Another term, such as live bacteria or live cultures, are more known than the term probiotics
- ▶ Consumers would like to be informed about probiotics through, for example, food labels
- ▶ The usefulness and usage of probiotics are not well known by the consumers

“Probiotics are popular, even people who do not use or buy probiotics **know** the term”

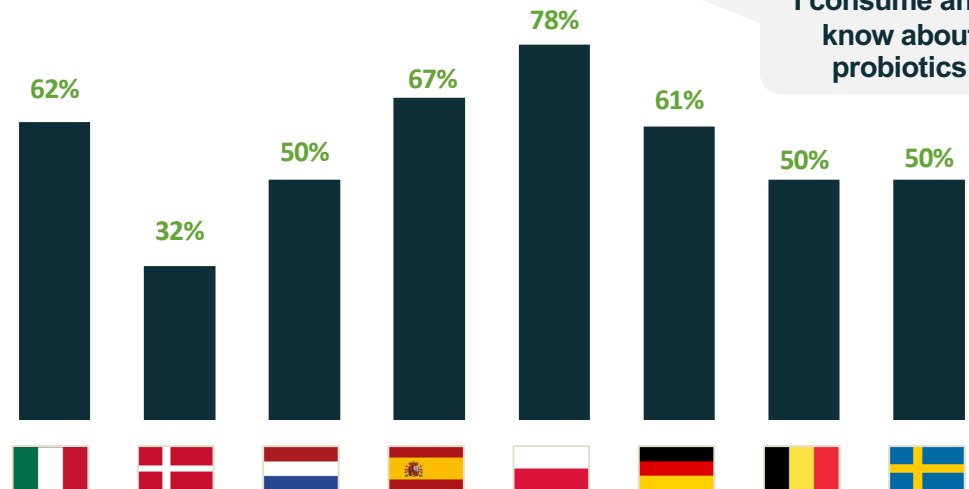
The knowledge on probiotics food and food supplements varies across Europe

Consumers in Poland, Spain and Italy (resp. 78%, 67%, 62%) are best aware. Danish consumers are the least aware of what probiotics is (32%).

Overall however, high familiarity with probiotics across Europe.

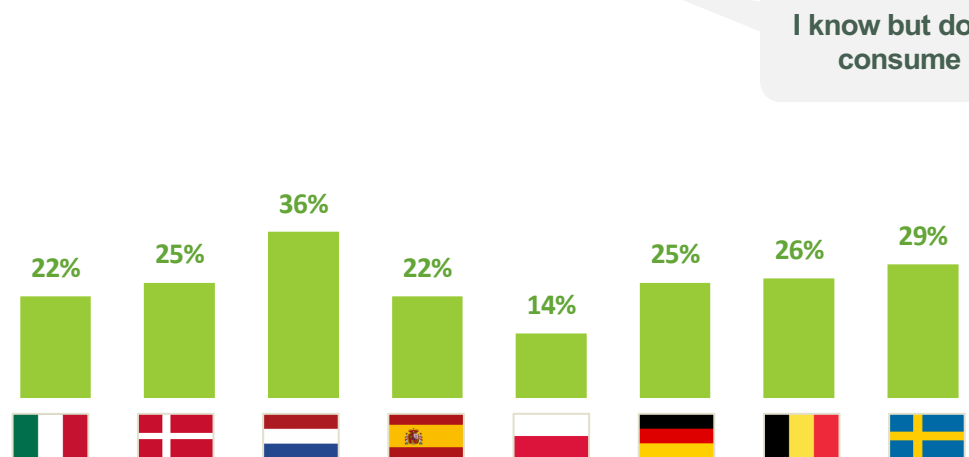
► **Do you know what probiotics food and food supplements are?**

(n=1000 per country)



► **Do you consume probiotics food and/or food supplements?**

(n=4491 subset of total population, only those who know what probiotics are, but don't consume probiotics)



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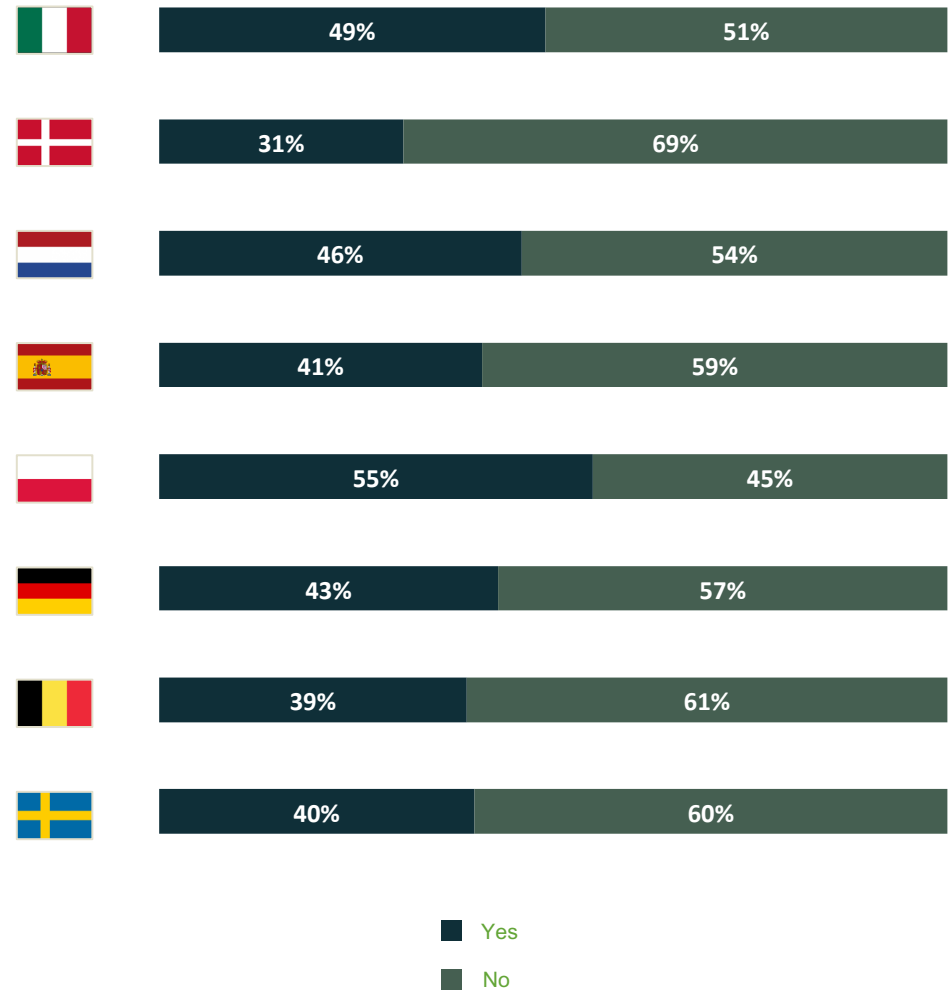
In 7 out of 8 countries, consumers feel not informed about probiotics in products.

Poland is the only market with bigger group of people feeling informed (55% vs 45%). Even here we still see a high proportion (45%) of consumers that don't feel informed.

Denmark stands out as 'only' 31% of the population feels informed.

► Do you believe you are informed about probiotics in products?

(n=1000 per country)

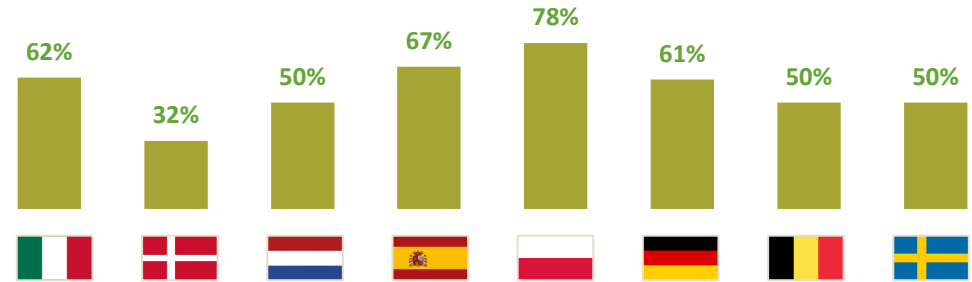


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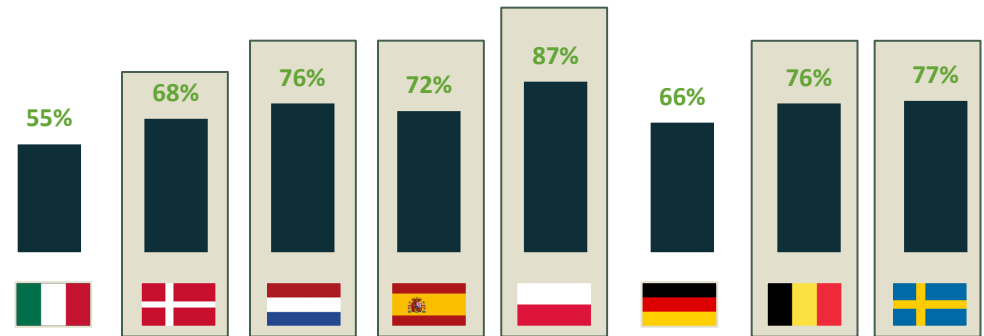
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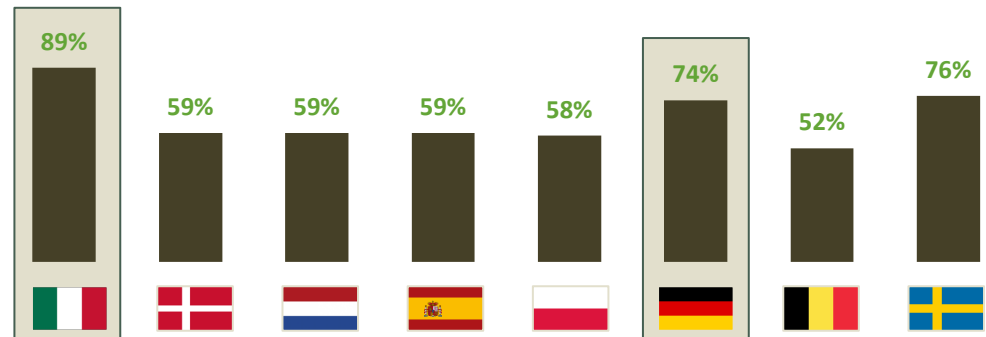
► Familiarity with ‘probiotics’ (n=1000 per country)



► Familiarity with ‘live bacteria’ (n=1000 per country)



► Familiarity with ‘live cultures’ (n=1000 per country)



Probiotic is part of lactic bacteria or live bacteria. But not all live bacteria are probiotics.

The fact that the term probiotic was not allowed make the consumers familiar with these terms

The use of these terms in some countries is also linked to the traditional use.

Between live bacteria and live cultures, live bacteria has the highest familiarity (except for Italy and Germany).

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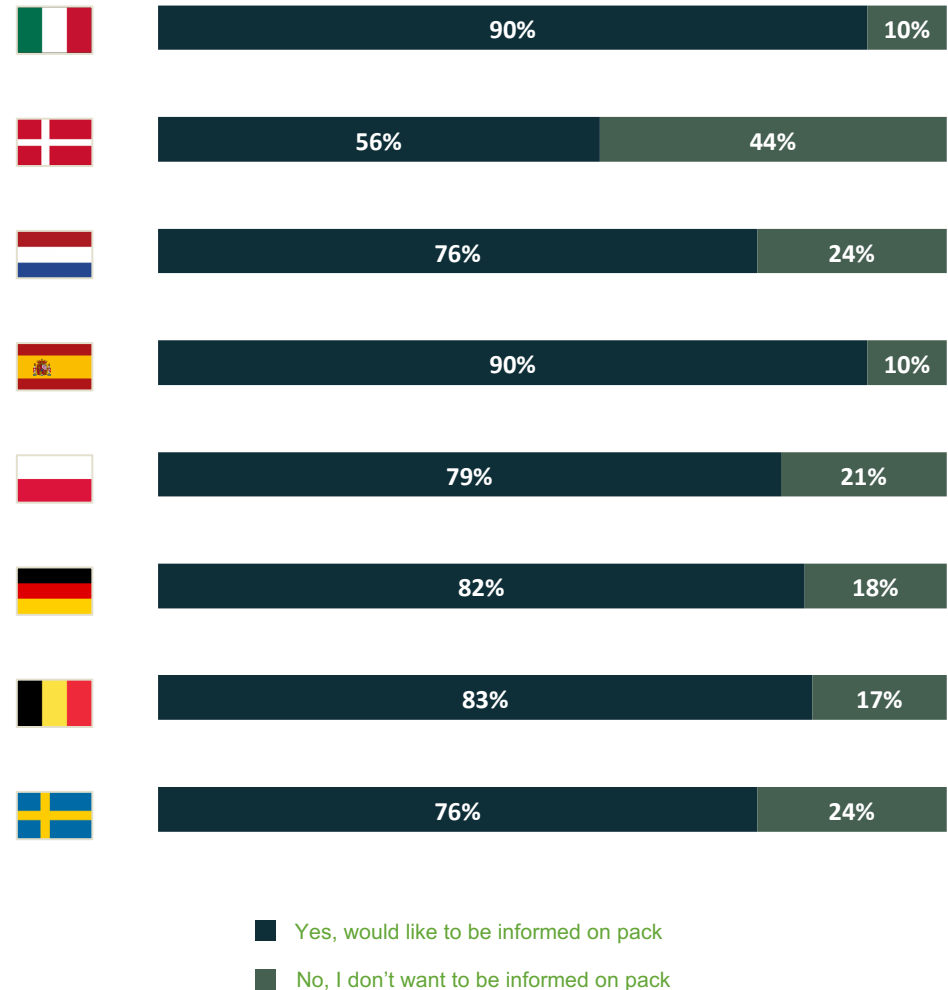
In all tested markets, consumers indicate they would like to see the term ‘probiotic’ indicated on the packaging.

The markets who feel strongest about the appearance on pack are Italy and Spain.

Denmark seems to be most divided on the issue. Nevertheless, slightly more than half of the Danish would like to be informed on pack;

► **Would you like to see the term ‘probiotic’ indicated on the product?**

(n=1000 per country)



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“What do you think probiotics are useful for?”

“For what reasons do you consume probiotics?”

(open questions – based on the answers, 4 groups of were identified using keywords)









Reasons

Consumers that know what probiotics food and food supplements are, but do not (know if they) consume it. They mainly refer to probiotics having a beneficial effect bacterial flora, digestion and stomach.

Consumers that know what probiotics food and food supplements are, **and also consume it**, mention that their main driver for probiotics consumption is overall health and wellbeing.









► What do you think probiotics are useful for?

n= consumers that know what probiotics food and food supplements are, but do not (know if they) consume it.

								
Bacterial flora, digestion, stomach, improve	14%	20%	31%	30%	24%	23%	24%	41%
Allergy, immune system, support, prevent disease	23%	12%	11%	23%	22%	19%	27%	18%
Health, wellbeing, reinforce, good	11%	11%	14%	17%	9%	18%	12%	18%
Did not answer, no idea, other use	55%	58%	50%	36%	50%	47%	42%	33%
n	211	124	229	225	196	231	209	228

► For what reasons do you consume probiotics?

n= consumers that know what probiotics food and food supplements are, and also consume it.

								
Bacterial flora, digestion, stomach, improve	12%	18%	15%	23%	18%	17%	18%	32%
Allergy, immune system, support, prevent disease	27%	9%	6%	13%	21%	14%	15%	14%
Health, wellbeing, reinforce, good	25%	44%	45%	46%	36%	43%	32%	30%
Did not answer, no idea, other use	37%	35%	39%	23%	28%	29%	39%	29%
n	412	192	271	443	585	376	292	267

Methodology



Study in eight countries:

- ▶ **Italy, Denmark, the Netherlands and Spain:** term 'probiotics' (partially) allowed by National guidance/standard
- ▶ **Poland, Germany, Belgium, Sweden:** term 'probiotics' not allowed by National guidance/standard

Per country:

- ▶ n= 1000* respondents
- ▶ 18+ years old
- ▶ *Nat rep* on age, sex, region





THIS PROJECT WAS DEVELOPED WITH THE
VALUABLE CONTRIBUTION OF THE
IPA EUROPE STEERING COMMITTEE

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